

A PATH TO THE FUTURE OF OTT IN THE PHILIPPINES

AVIA Philippines in View

Tuesday, 18 May 2021
2:20 P.M. SGT

GREG ARMSHAW

Head of Media, Asia
Brightcove





**Greg
Armshaw**



Time Inc.



BBC

Worldwide



ONE
Championship™

KASKUS
THE LARGEST INDONESIAN COMMUNITY



SPOTV



amc



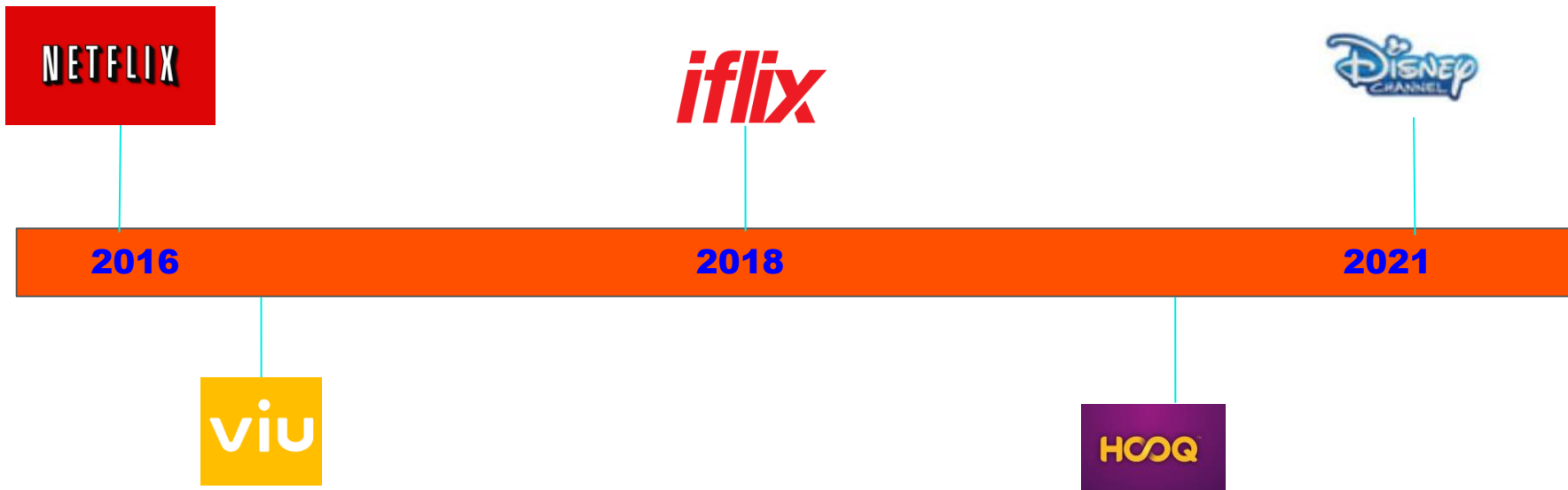
BRIGHTCOVE®



“Most people overestimate what they can do in one year and underestimate what they can do in ten years.”

Bill Gates

5 Years of OTT



**WHERE ARE WE
NOW?**



5 Years of OTT

The Netflix logo is displayed in white, stylized capital letters on a red rectangular background.

2016



2021

1GB Data - PHP26

7.44 mbps

Cost of data dropped 65%

Avg Speed tripled

1GB Data - PHP9

22.5 mbps

JAN
2021

THE PHILIPPINES

ESSENTIAL HEADLINES FOR DIGITAL ADOPTION AND GROWTH

CHANGES TO DATA SOURCES MEAN VALUES ARE **NOT COMPARABLE** WITH PREVIOUS REPORTS



THE PHILIPPINES

TOTAL
POPULATION



110.3
MILLION



ANNUAL CHANGE:
+1.3%
+1.5 MILLION

MOBILE
CONNECTIONS



152.4
MILLION

we
are
social

ANNUAL CHANGE:
-8.9%
-15 MILLION

INTERNET
USERS



73.91
MILLION



5 year change
+26.81 Million

ANNUAL CHANGE:
+6.1%
+4.2 MILLION

ACTIVE SOCIAL
MEDIA USERS*



89.00
MILLION

ANNUAL CHANGE:
+21.9%
+16 MILLION



JAN
2021

INTERNET CONNECTION SPEEDS: OVERVIEW

AVERAGE **DOWNLOAD** SPEEDS FOR MOBILE AND FIXED INTERNET CONNECTIONS, WITH YEAR-ON-YEAR COMPARISONS



THE PHILIPPINES

AVERAGE DOWNLOAD
SPEED OF MOBILE
INTERNET CONNECTIONS



we
are
social

22.50
MBPS

YEAR-ON-YEAR CHANGE IN
AVERAGE SPEED OF MOBILE
INTERNET CONNECTIONS



KEPIOS

+34.2%

AVERAGE DOWNLOAD
SPEED OF FIXED
INTERNET CONNECTIONS



GO

31.44
MBPS

YEAR-ON-YEAR CHANGE IN
AVERAGE SPEED OF FIXED
INTERNET CONNECTIONS



+23.1%

JAN
2021

OVERVIEW: CONSUMER GOODS ECOMMERCE

SIZE AND GROWTH OF THE B2C CONSUMER GOODS* ECOMMERCE MARKET (IN U.S. DOLLARS)



THE PHILIPPINES

NUMBER OF PEOPLE
PURCHASING CONSUMER
GOODS VIA THE INTERNET*



statista

38.88
MILLION

TOTAL VALUE OF THE
CONSUMER GOODS
ECOMMERCE MARKET



\$3.55
BILLION

ANNUAL GROWTH IN THE TOTAL
VALUE OF THE CONSUMER
GOODS ECOMMERCE MARKET



we
are
social

+42.5%

ONLINE CONSUMER GOODS
PURCHASES: AVERAGE
ANNUAL SPEND PER USER



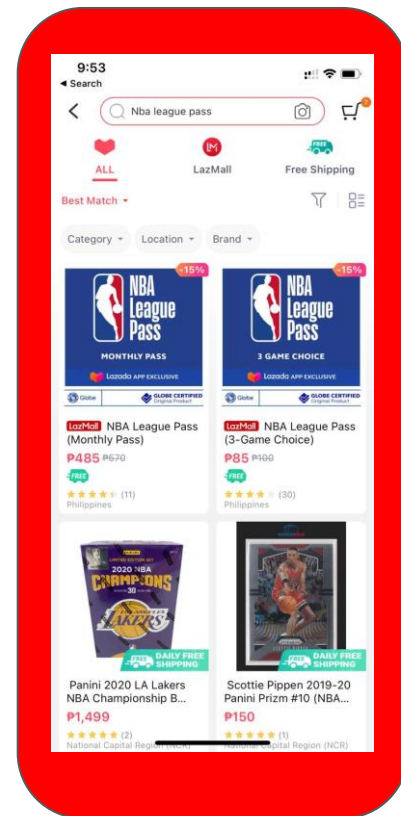
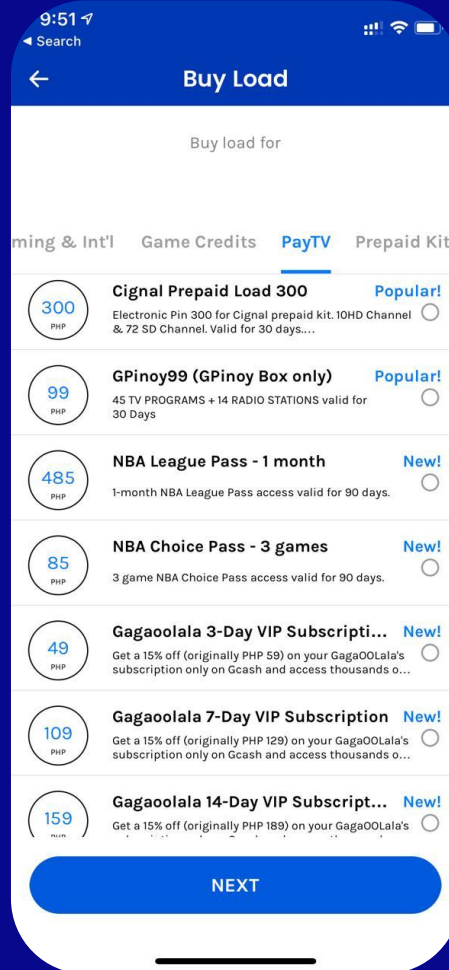
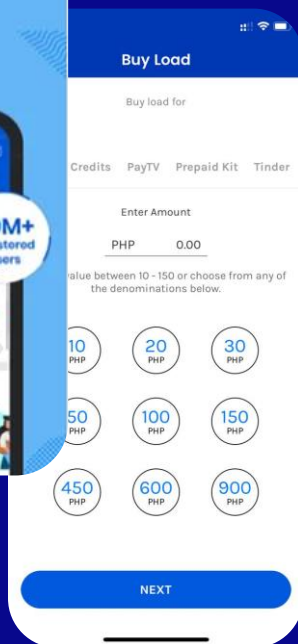
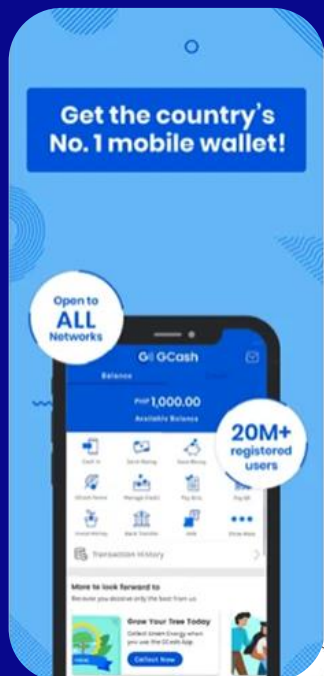
\$91

SOURCE: STATISTA MARKET OUTLOOK FOR E-COMMERCE (ACCESSED JAN 2021). FIGURES BASED ON ESTIMATES OF FULL-YEAR CONSUMER SPEND FOR 2020 AND 2019, EXCLUDING B2B SPEND. SEE [STATISTA.COM](https://www.statista.com) FOR DETAILS. **NOTES:** IN THIS CONTEXT, "CONSUMER GOODS" INCLUDE FASHION & BEAUTY PRODUCTS, ELECTRONICS & PHYSICAL MEDIA, FOOD & PERSONAL CARE PRODUCTS, FURNITURE & APPLIANCES, AND TOYS, HOBBY & DIY PRODUCTS. ♦ **COMPARABILITY ADVISORY:** BASE CHANGES. DATA NOT COMPARABLE WITH PREVIOUS REPORTS.

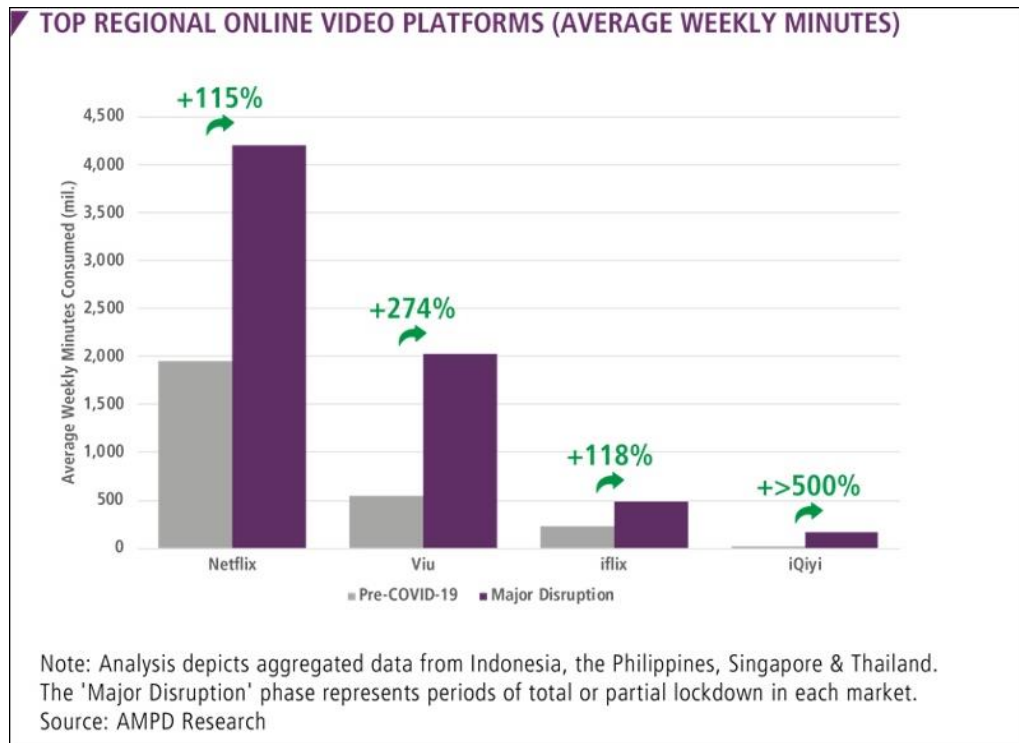
we
are
social



Hootsuite



Growth in OTT TV consumption



MPA's analysis indicates that the four markets had a combined 7 million paying online video or OTT customers. \$US\$350 million in annual consumer spend.

Apr 2020



Home^{of.}
Filipino
Stories

iWantTFC



**OTT IS FOR
EVERYONE**

Events in 2020 have disrupted the Philippines media landscape significantly and accelerated the shift to digital consumption by two to three years. As consumers access more video content on demand through OTT apps, video streaming platforms are offering smarter, addressable, and targeted solutions to marketers. By creating customized audience segments based on an advertiser's business objective and overlaying rich first-party data sets, OTT platforms have been able to ensure brand-focused campaigns can be more effective.

SPOTX

**Fundamentally
OTT TV has a
product market fit
in The Philippines**



So..
What is Next?



Time to Capture Opportunity

Time to maximise your reach and saleable experiences

Apps

Targeted services with niche offerings can reach Tech break-even* with as few as 10,000 MAU

*not including content costs

Live/Linear

A sizeable audience wants to watch linear streams supported by Ads.

Yes, TV migrating to TV online - especially on device lead platforms
E.g Samsung Smart TV Plus

Events

As sports content rights right size globally access to rights will present opportunities for the agile.

Post pandemic Arts organisations will seek to maximise hybrid experiences

MONETISATION WHO WILL PAY?



END USERS
(SVOD / TVOD)

ADVERTISERS
(AVOD)



SPONSORS
(WITHIN CONTENT)

BRANDS
(PROMOTIONAL SALES)

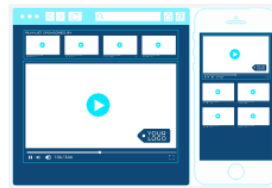
CONTENT OWNERS
(ALIGNED CONTENT OWNER CREATORS)

MONETISATION

WHO WILL PAY?



**RELATED VIDEO
ADS, TRAILERS**



**SPONSORED
SKINS**



**BRANDED
PLAYERS**

SPONSORS



COUPONS



**SPONSORED VIDEO
RAILS**



**PRODUCT PLACEMENT
WITH INTERACTIVITY**



CONTENT TO COMMERCE



AFFILIATE FEES

BRANDED CONTENT AND ACCESS

ALIGNED CONTENT OWNER CREATORS



Fresh Releases

Viu Original

Korean Dramas

Korean Variety

Lifestyle

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Member

Fresh from Japan

NEW on Viu!



Hunter x Hunter

Anime



One Punch Man S2

Anime



Familiar Wife (JP)

Japanese Dramas



Attack on Titan Final Season

Anime



Cells at Work! CODE BLACK

Anime



Cells at Work!!

Anime



Tokyo Love S

Japanese Drama

Celebrate Lazada's Bday with Lee Min Ho



Stack & Save on 27 Mar

Celebrate Lazada's 9th Birthday with Lee Min Ho



Lazada Bday BTS with Lee Min...

Celebrate Lazada's 9th Birthday with Lee Min Ho



Legend of the Blue Sea

Korean Dramas



The Heirs

Korean Dramas



Boys Over Flowers

Korean Dramas



Trailer: Legend of the Blue

Trailers



Let's Viu

Trailers

Editor's Pick



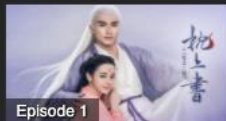
The Penthouse 2

Korean Dramas



River Where the Moon Rises

Viu Original



Eternal Love of Dream

Chinese Dramas



Criminal Minds : Korea

Korean Dramas

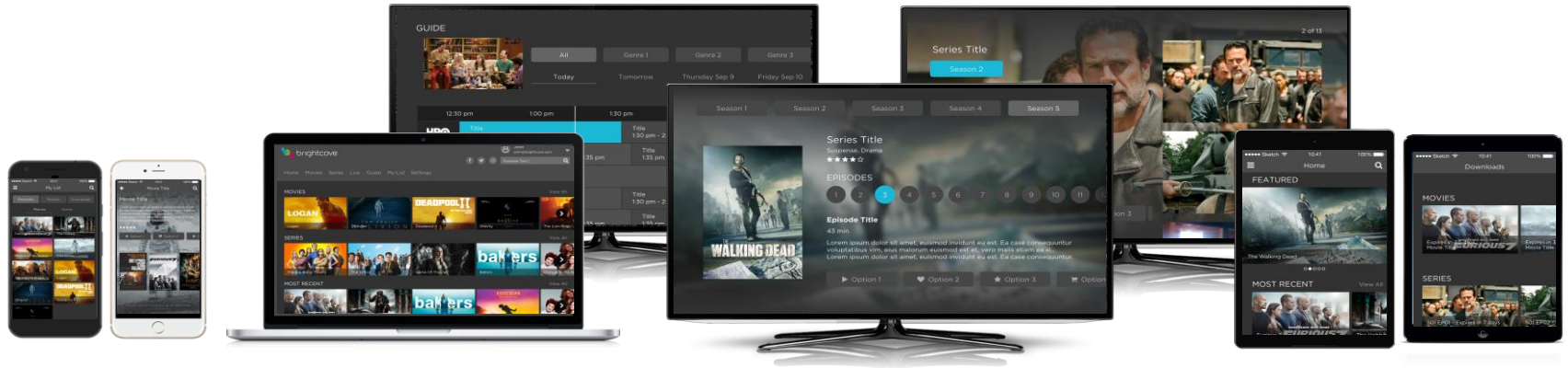


PARTNER WITH BRANDS



GROWING REACH WITH NEW DEVICES

Even large screen devices in Philippines are starting to be connected to the internet



ios



android



Roku



web



androidtv



amazon fireTV



LG

A BRIGHTCOVE VIDEO STORY

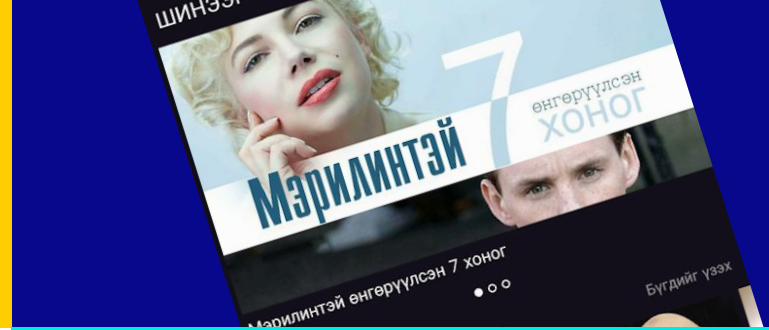
MONGOLTV

The network offers free-to-air programming that includes both localized, company-produced content and licensed international content from the United States, Korea, Turkey, and the United Kingdom. Iare huge draws for the network.



“being able to give these consumers on-demand, customized video in the form of an easily accessible OTT product was the ideal solution.”

Bat-Erdene Gankhuyag
Co-founder of ORI



THE RESULTS FOR MONGOLTV

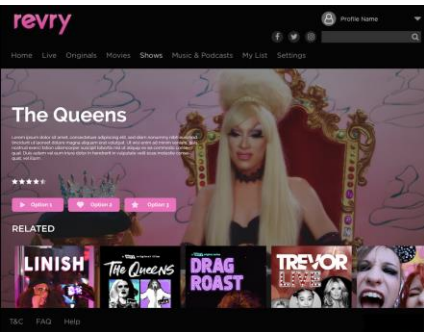
- ▶ Mongolia's First-Ever OTT Service
- ▶ 5K Subscribers in Just Five Months
- ▶ Small team servicing users across multiple markets
- ▶ Live Channels

A BRIGHTCOVE VIDEO STORY

REVRV



As the first global streaming network for the LGBTQ community, Revry has created a bold platform that's able to showcase multiple viewpoints and stories as it informs and inspires the worldwide LGBTQ community.



“A lot of technology providers can’t make the promises and commitments that Brightcove Video can make.”

Damian Pelliccione
CEO and co-founder of Revry

THE RESULTS FOR REVRV

- ▶ Quickly brought to life by Brightcove Beacon
- ▶ Over 1,000 hours of movies, shows, news, music and podcasts
- ▶ In over 130 countries, 250 million homes and devices
- ▶ 4 live TV channels plus Revry Now 24/7 news network



CREATING NEW ASSETS WITH LIVE

BRIGHTCOVE®

**LIVE EXPERIENCES THAT YOU
CAN TRUST TO SCALE TO MEET
DEMAND**

AND GENERATE REVENUE

**RELIABLE, HIGH-QUALITY LIVE
STREAMS THAT SCALE TO SUPPORT
MILLIONS OF CONCURRENT
VIEWERS WITH TARGETED
ADVERTISING.**

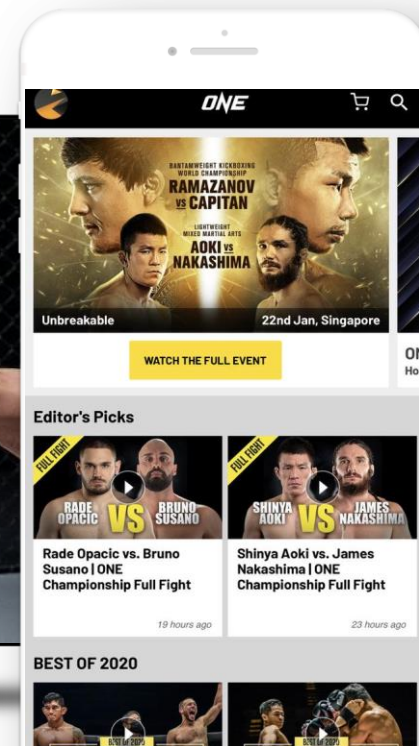
**SUPPORT FOR BOTH 24/7/365 LIVE
CHANNELS,
AND LIVE EVENTS.**



ONE CHAMPIONSHIP SINGAPORE AND SEA

LAUNCHED A **CURATED 'SIMULIVE'**
CHANNEL USING BRIGHTCOVE CLOUD
PLAYOUT

INCREASING VIEWERSHIP - CREATING
A DESTINATION TO **TUNE IN ALL DAY,**
EVERY DAY.



iOS



Android



Web

Live Events Drive Engagement



PAID CONTENT FROM MAYBELLINE

Pick Your Path To Perfect Skin

MAYBELLINE



From dark circles to dullness, Master Camo™ Color Correcting Pens from Maybelline New York can handle the toughest of skin concerns. Just pick your skin tone and skin concerns, and follow your path to a flawless complexion. With six easy-to-use shades, you'll be looking refreshed in no time.



VOGUE

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Time In Hollywood
1 day agoSaid & Scripted In Making
Remainder Statement
Rejoice
1 day agoKill
Real
With
WTF
From
1 day ago

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ADVANCED

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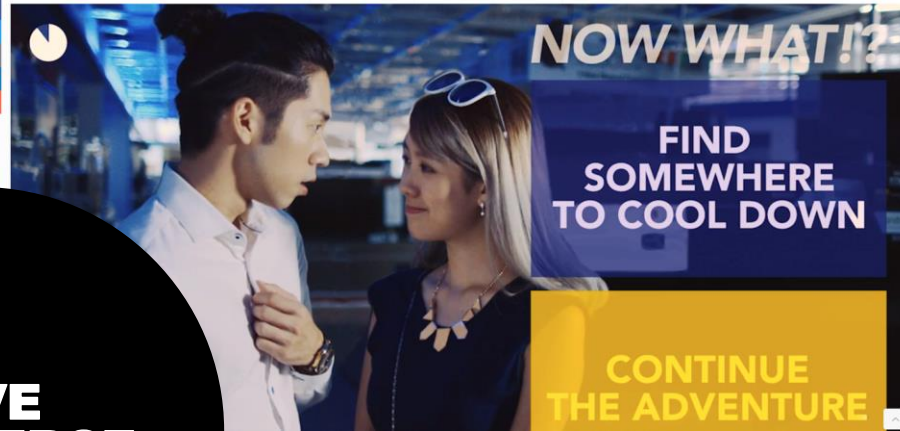
SHOP NOW



SHOP NOW

LIVE
COMMERCE
OTT TV

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TO RECAP - PATHWAY TO GROWTH

**THE MARKET IS
MADE**

**BE CREATIVE AND
BUILD ASSETS TO
ENGAGE YOUR
VIEWERS**



**FIND VALUE FOR
YOUR
ADVERTISERS**

**WITH SPONSORSHIP,
PROMOTION,
PARTNERSHIP &
BRAND NEW ASSETS**



**BE OPEN TO
OPPORTUNITY**

**EVENTS SUCH AS
PREMIERS, SPORTS,
ARTS AND BRAND
EVENTS CREATE
VARIETY**



**THANK
YOU**